

RESEARCH

Intermediate

60 MIN

· UPDATED 2026-09-30

Research and present a competitor.

Gather public data, analyze market positioning, and build a profile deck.

MICROSOFT 365

PowerPoint

OneNote

WORKS WITH

ChatGPT

Claude

Copilot

Business Outcome

A competitive teardown presentation.

Workflow Steps

Step 1: Research

OneNote

Write down the competitor's name, the specific market or segment you're comparing, and a date cutoff (e.g., "last 12 months") before opening a single browser tab – this stops the research from sprawling into every mention of the company ever published.

Create a dedicated OneNote section and drop in links and screenshots from company announcements, product/pricing pages, public filings, and reputable industry coverage as you find them.

Step 2: Build an evidence table

OneNote

Turn the section into a table with columns for Finding, Source URL, Date, and Excerpt, and fill in one row per piece of evidence – copy the actual supporting sentence, not your memory of what it said.

Keep a separate "Your take" column for interpretation, so it's never ambiguous later which parts of the deck are sourced fact and which are your read on it.

Step 3: Compare market position

OneNote

Add a comparison section listing their products, target customers, and any pricing signals you found, lined up next to your own company's approved positioning for the same categories – side-by-side rows make a real difference (or the absence of one) obvious in a way prose paragraphs tend to bury.

Step 4: Draft the profile

Copilot

ChatGPT

Claude

Give your AI the evidence table and ask it to structure the story – use Copilot if it's licensed for PowerPoint, or paste the table into ChatGPT or Claude otherwise.

PROMPT

Using only the evidence table below, draft a 10-slide competitor profile outline: overview, target customers, pricing signals, strengths, risks, open questions, and implications for us. Cite the row number for every claim, and mark anything not covered by the table as an open question instead of guessing.

Step 5: Build the deck

PowerPoint

Build the PowerPoint deck from that outline.

Step 6: Validate and present

PowerPoint

Go slide by slide and reopen the cited source for each claim – confirm the date is still accurate and the figure hasn't changed since you captured it, since competitor pricing and product pages change without notice.

Mark anything you couldn't fully verify as an estimate directly on the slide, rather than presenting it with the same confidence as a sourced fact.

✓ Check the work

- Every factual claim has a current, accessible source.
- Comparisons use the same period and definitions.
- The presentation distinguishes evidence from analysis.

Expected Outcome

A 10-slide profile on the competitor.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■